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ABSTRACT

A study examined the provision of vocational training (VT) and its relationship to economic development in the region of Portugal encompassing the municipalities of Alcobaca and Caldas da Rainha. Data were obtained from a number of sources: regionally based statistical information, published documents and studies/reports about the region, interviews with representatives of a sample of 15 enterprises participating in VT initiatives, interviews with staff of Portugal's Vocational Training Center for the Ceramics Industry, and a brief study of the Vocational Training Center for the Metalworking Industry. The information was synthesized into a report focusing on the following: the region's economy, labor market, and development; the structure and availability of VT in Alcobaca and Caldas da Rainha; regional demand for VT; coordination between economic agents and bodies offering VT; and the study's contributions to the evaluation of training on a territorial basis. A relative imbalance between enterprises' VT needs and the profile of VT available in the region was discovered. The region's economic agents and bodies offering VT were found to be taking steps toward increasing cooperation with one another and enhancing the region's training capabilities. A framework for evaluating VT in a territorial context was proposed. (Contains 15 references.) (MN)

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CEDEFOP Document

Evaluation of vocational training in a territorial context

Vocational training and development in the region of Alcobaça and Caldas da Rainha

European Centre for the Development of Vocational Training

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Evaluation of vocational training in a territorial context
Vocational training and development in the region of Alcobaça and Caldas da Rainha
The following took part in this study:
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INDEX

		Pages
0. PREFACE		
0.1	Scheme of the report	5
0.2	Methodological details of the component parts of the Study and its organization	5
0.3	Outline of the structure of the report	11
I. BRIEF DESCRIPTION OF THE REGIONAL FRAMEWORK		
1.	Economic structure and structure of production	12
2.	The labour market	13
3.	Prospects for regional development	16
II. BRIEF DESCRIPTION OF THE EDUCATION AND TRAINING SYSTEM		
1.	Institutional background to the system	17
2.	The availability of vocational training in Alcobaca and Caldas da Rainha	20
III. OPERATION OF THE VOCATIONAL TRAINING SYSTEM		
1.	The demand for training: identification of undertakings' training needs	23
2.	Co-ordination between economic agents and the bodies offering training	27
3.	Methods of co-operation in the area of training	30
4.	Arrangements for co-ordination and monitoring	34

IV. CONTRIBUTIONS TO THE EVALUATION OF TRAINING ON A TERRITORIAL BASIS — Pages

1. Placing training evaluation in its context in territorial terms — 37

2. The basis of the system-orientated analysis — 39

3. Construction of a reference table for the evaluation of training in a territorial context — 42

V. CONCLUSIONS AND PROSPECTS

1. Final considerations — 46

2. Prospects of comparative research regarding the evaluation of vocational training by reference to territorial areas — 48

BIBLIOGRAPHY — 50

0. PREFACE

0.1 Scheme of the Report

The report of the Portuguese team taking part in Project No. 2.1061 "Evaluation de l'impact d'operations de formation professionnelle dans un cadre territorial" has taken due account of the terms of the technical annex to the contract concluded with CEDEFOP (Contract No. 303/910219) and also of the research developments which reflect the manner in which discussions between the various national teams evolved.

In the light of those factors, in studying the relationships between vocational training and regional development, attention must be drawn to the importance of:

- the regional context, taking account not only of the fundamental aspects of the existing patterns but also of the prospective component, which enables future developments to be envisaged against a background of increasing openness to the outside world, represented by the aspect of the training of human resources and the acquisition of qualifications in the medium and long term;

- the machinery for cooperation existing with regard to the school and vocational training available on a territorial scale;

- the production of support facilities for decision-making on the part of the social and economic participants, both those involved in the operation of the education and training system and those who use it and to whom it is addressed.

0.2 Methodological details of the component parts of the Study and its organization

0.2.1 Consistent nature of the geographical area of the study

The small region made up of the municipalities of Alcobaca and Caldas

da Rainha[1] fulfils a set of requirements of some importance regarding the study of the relationships between training and development and the preparation of a consistent reference table for the operations involved in the evaluation of vocational training. Among those requirements, the following are noteworthy:

- historical and cultural identity;
- economic structure: productive specialization and openness to the outside world in a context of regional competitiveness at national and international levels;
- uniformity of conditions regarding the mobilization and use of human resources;
- the presence of a varied range of public bodies and related associations operating in the area of provision of school and vocational training and in that of regional development;
- the existence of mechanisms for and experiments in cooperation which are at present under way.

A background displaying the above features is from the outset conducive to the study of the various levels and types of relationships between vocational training and regional development. However, it is important not to overlook the fact that, whilst the identities, the patterns of development and the functioning of the labour market confirm the validity of the choice and make it possible to "construct" a cohesive and operational regional environment, there exist, as regards training facilities, a number of choices for which the preparation and decision-making process are undertaken on a supra-regional basis, since there is considerable centralization in Portugal in matters of vocational training.

0.2.2 Components of the study

In the terms of the technical annex to the contract between CEDEFOP and the Portuguese teams, the study covered two phases:

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[1] Cf. Regional Framework Report, 1st Phase, AIRO.

Phase I - Regional context and description of the education/training system

Phase II - Functioning of the training system

This approach is based on the understanding that a study concerned with evaluation of vocational training in a regional context must be oriented so as to highlight the relationships existing between the various regional sub-systems:

i) the economic sub-system: the productive structure and the dynamics of the business network; the functioning of the local labour market and the strategy of enterprises in relation to the management of employment (personnel numbers and structure of demand for qualifications);

ii) the education/training sub-system: availability of school and vocational training, structures and machinery for cooperation on a regional scale; existing and medium-term strategies of the institutions offering school and vocational training.

The regional level provides the most suitable context for understanding the strategies of the various parties involved as promoters of interaction between the sub-systems mentioned above, so that the process of evaluation can be placed in context.

0.2.3 Information for the study

The various component parts of the regional information system display shortcomings in relation to the actual functioning of the labour market and the availability of school and vocational training, thus not only placing a limitation on studies of the present kind, but also, in particular, creating an obstacle to decision-making at micro-economic level.

The study was carried out using two complementary methods:

- Compilation and processing of information from conventional sources

- Regionally-based statistical information, in particular from the National Statistical Institute and from the bodies which produce information relating to employment: Employment Centres (local) and the Statistical Department of the Ministry for Employment and Social Security (national);

- documents, studies and reports of regional scope prepared by various public authorities and private bodies and associations, containing information relevant to characterization and examination of the regional context from the demographic, economic and social points of view (comprising, essentially, the basic information contained in the regional framework report).

Production of empirical information

With a view to studying the manner in which enterprises are moving towards vocational training and to studying the bodies offering vocational training which are located in the region and seek to meet the needs of the businesses in Alcobaca and Caldas da Rainha, arrangements were made for the compilation of qualitative information on the basis of interviews with undertakings and training bodies, in relation to two key aspects:

A - Study of the manner in which enterprises are moving towards vocational training

(procedures for identifying training needs; information used in decision-making regarding recruitment and classification of human resources; levels of adjustment of supply/demand in terms of human resources).

This component of the work was based on fifteen interviews with a sample of undertakings located in the municipalities of Alcobaca and Caldas da Rainha, selected by reference to their sectoral representativeness in terms of employment, dominant position in the labour market (considered in relation to availability of labour/demand for qualifications) and participation in vocational training initiatives (arrangements for own training, organization of activities, involvement in cooperation agreements).

The interviews covered the following fundamental points:

- management of human resources (recruitment and new qualifications);

- corporate attitudes to vocational training (training needs; facilities for designing training programmes and activities; organization and frequency of activities, coordination between enterprises and training institutions);

- vocational training and regional development (capability of providers of local/regional training to respond to requirements as to qualifications; machinery for cooperation between economic agents/training institutions at local/regional level).

B - Study of CENCAL - Centro de Formação Profissional para a Indústria Cerâmica (Vocational Training Centre for the Ceramics Industry) (cooperation model existing within CENCAL; scheduling of training activities; recruitment and training of trainers, monitoring facilities; impact of training on trainees and enterprises).

This component of the study was based on:-

- study of existing reports and other documents on CENCAL's activities and on the philosophy of the setting up and location of facilities;

- in-depth interviews with the management of the Centre and those responsible for the recruitment of young people (initial training), for the selection of enterprises (for practice periods and on-the-job training) and for monitoring arrangements.

In the interviews with CENCAL executives, information was obtained which was fundamental to the aims of the study, in particular with regard to:

. the identification of training needs;

. the scheduling of training activities and the dissemination of information;

- experience of cooperation between the Centre, enterprises, sectoral and regional associations, secondary schools, etc.;

- machinery for vocational guidance and information;

- interaction between activities in the area of vocational training and regional policy instruments approved for the Region.

In addition, a brief study was also made of the Centro de Formação Profissional da Indústria Metalomecânica (CENFIM) (Vocational Training Centre for the Metalworking Industry), which is a national body but has recently set up a regional office at Caldas da Rainha for the purpose of offering training (initial training and continuing training) in areas of horizontal specialization to meet the specific needs of industrial undertakings in various branches of activity.

0.2.4 Cooperation with a local partner: production of information and interaction between participants

At all times during the course of the Study, there was extensive interaction between GEOIDEIA and AIRO - Associação Industrial da Região Oeste - of which the overall results were positive.

In view of the traditional resistance of business circles to contacts with researchers, the direct cooperation of this local partner provided valuable support for the research work, particularly if it is borne in mind how wary significant parts of the business world are concerning matters of training.

Cooperation between the two institutions also made it possible to comment, in a spirit of openness, on the results of the intermediate phases of the research.

0.2.5. Profile of the research team

The human resources mobilized for the study were allocated to two sub-teams:

- local team

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. an engineer, a specialist in new industrial techniques, responsible for contact with undertakings, allocated to the employers' association;

. an economist, a specialist in industrial promotion, responsible for bringing support facilities to the attention of undertakings regarding training and innovation, allocated to the employers' association.

- team with a strong university bias

. a specialist in industry, services and regional development;

. a specialist in employment and vocational training

0.3. The Structure of the Report

The final report on the Portuguese participation in the CEDEFOP Project comprises two basic components:

- a brief description of the regional background and the structure of the education/training system;

- an analysis of the relationships between vocational training and development in the region of Alcobaca and Caldas da Rainha and contributions to the evaluation of vocational training in a regional context.

Those components have been arranged as follows:

I. BRIEF DESCRIPTION OF THE REGIONAL BACKGROUND

II. BRIEF DESCRIPTION OF THE EDUCATION/TRAINING SYSTEM

III. FUNCTIONING OF THE VOCATIONAL TRAINING SYSTEM

IV. CONTRIBUTIONS TO THE EVALUATION OF VOCATIONAL TRAINING IN A TERRITORIAL CONTEXT

V. CONCLUSIONS AND PROSPECTS

I. BRIEF DESCRIPTION OF REGIONAL BACKGROUND

1. Economic and Productive Structure

The structure of productive activities in the region of Alcobaca and Caldas da Rainha is based on the exploitation of local natural resources, with particular emphasis on:

- land suitable for agriculture, which facilitates the pursuit of various enterprises, on a multiple basis, from vines, fresh horticultural products and cereals to fruit and livestock; some of these enterprises provide the basis for numerous conserving and processing activities, in particular for horticultural products and fruit;

- mineral resources, used by ceramic industries and producers of building materials (non-metallic mineral products), located at Alcobaca and Caldas da Rainha, mainly in the areas of fine ceramics, porcelain and pottery.

As well as this exploitation of natural resources, there is the tourist industry based on the combination of sun and sea, backed by excellent natural surroundings and diversified landscape.

As regards employment of the active population, although one-fifth of people in employment still work in agriculture, job creation is concentrated in the industrial, building and services sectors; in geographical terms, Alcobaca concentrates on secondary activities and in the case of Caldas da Rainha the focus is on the tertiary sector.

In the industrial sector, the main specialization is the manufacture of porcelain, pottery and stoneware, which in 1989 accounted for about 28% of industrial employment, having become more important in terms of employment creation throughout the 1980s. Other significant industrial sectors are food and drink, footwear and furniture. In the production

sector, the climate of sectoral stabilization has slowly improved with trends towards a wider range of products and diversification in the ceramics industry (for example, greater porcelain production) and the footwear industry.

From the technological point of view, recent regional industrial developments are characterized by modernization and a lower level of innovation, without any breakdown in the productive processes being apparent, with the exception of the processes for the separation of ceramic clay, where foreign economic groups have entered the scene.

The business network in the region is quite varied, with a predominance of small and medium-sized undertakings, which were a driving force in the creation of industrial employment during the 1980s, showing enterprise in the area of training and a wide range of production strategies.

At the same time, it is possible to identify substantial business units in various areas of activity, some established in the past, others deriving from an intense process of business reorganization which is not unconnected with the involvement of national economic groups and even foreign capital.

The expectations which came to light during the interviews indicate hopes of more extensive regional establishment of industrial activities, although a number of constraints upon business activity were identified:

- market development in specialized sectors;
- shortage of skilled manpower;
- deficiencies in the energy and telecommunications networks;
- shortcomings regarding accessibility by road.

2. The Labour Market

Throughout the 1980s, the industrial sector in Alcobaca and Caldas da Rainha displayed great capacity for net job creation, with weighted

averages higher than those recorded in comparable geographical areas, and at a level rather higher than the average for continental Portugal. This expansion in industrial employment took place above all in and after 1987, as a result of the greatly increased domestic and world demand in labour-intensive sectors, which gave rise to great pressure on the labour market, resulting in particular in:

- a shortage of skilled human resources, particularly middle-level technical staff and management staff;

- an absolute scarcity of labour, with the municipalities of Alcobaca and Caldas da Rainha displaying limited potential for population growth;

- an increase in average wage levels, with much pressure being brought to bear by those with greater skills;

- A high level of labour turnover.

The increased demand for labour by enterprises, either as a result of the need to replace personnel of various skill levels who left in order to start their own businesses or to respond immediately to increases in orders, widened the geographical area for recruitment of labour. From the starting point of a relatively closed and immobile labour market at the beginning of the 1980s, things opened up with greater movement to and fro between home and work, along the following lines in particular:

- movements of labour within municipal areas, from rural parishes to the urban centre (administrative jobs, civil construction and public works, processing industry);

- movements of labour from one municipal area to another, starting from the municipalities on the fringes of Alcobaca and Caldas da Rainha, and involving:

  - labour movements within the same industrial sector, brought about by wage differences;

  - access to employment for the active rural population,

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providing labour for intensive low-skilled work (footwear, ceramics, etc.);

- movements of labour from the ex-colonies, brought to the region by manpower-placement networks which were being set up.

An analysis of regional human resources, based on the organization charts of industrial undertakings (1989 figures), shows the existence of:

- low skill levels of employees, about sixty per cent having achieved only basic education levels (four years of schooling);

- a very low percentage of employees who have followed vocational courses (two per cent);

- more than half of employees are semi-skilled, unskilled and trainees and apprentices;

- between 1985 and 1989, a period of significant growth in employment and industrial activity, middle management became a less significant part of the skills structure, and the same occurred with highly skilled employees and other management staff.

The results obtained from a review of the information obtained in interviews with fifteen enterprises in Alcobaca and Caldas da Rainha, covering about 3,000 workers, are not substantially different as regards skill levels, but show a higher level of skill among employees, particularly in the case of middle and senior management and managerial staff (foremen, supervisors, skilled workers, highly qualified professional staff).

The human resources potential of the region thus appears relatively weak both in quantitative terms, as a result of a lower percentage of young people, and in qualitative terms, as is apparent from the analysis of levels of skills and qualifications.

In the long term, a policy of industrial development which exploits the opportunities of the international market and takes advantage of the

region's resources should ensure potential human resources more commensurate with development needs, presupposing, inter alia:

- improved urban residential conditions to retain young skilled workers;
- a reversal of natural development trends;
- correction of the inter-municipal and regional mobility patterns;
- reconciliation between supply and demand for qualifications.

3. Prospects of Regional Development

The prospects for regional development in Alcobaca and Caldas da Rainha are closely linked with the evolution of decisive trends in certain economic and social areas:

- Patterns of development in traditional areas of specialization

  (In the recent past, these sectors have stimulated a high rate of growth of new enterprises, mainly based on short-term strategies to satisfy demand, without even minimum business management requirements. The stabilization of demand, both internal and external, around more demanding sub-sectors - for example, in terms of quality and design standards - should bring about a change in business approach and higher technological levels, with an overall reduction in the number of people employed, accompanied by an increase in skill levels: middle management, new occupations and managerial staff).

- Consolidation of the existing socio-productive organization

  (The fragility of the regional economic structure in the area of provision of services to industry and in the area of marketing organization indicates the possible existence of a number of investment opportunities and room for innovation which might have a positive impact on employment, with new needs for skilled human resources).

- Greater accessibility

(The improvement of railways provided for in the National Railway Plan turns to account the proximity of the region to Lisbon and the main land, sea and air frontiers and facilitates greater access to the benefits of market growth deriving from European integration. For Alcobaca and Caldas da Rainha, with a tradition of links with foreign countries, greater openness, against a background of regional competitiveness at national and international levels, is one of the factors that are crucial to enhancement of the processes of proper exploitation of the inherent potential of the region).

This openness, which extends the significant productive specialization of Alcobaca and Caldas da Rainha in traditional sectors in step with the outward-looking nature of markets with the coming of the Single Market and the reshaping of business strategies (already under way, with examples in the region), has the potential to create new situations at very different levels, affecting:

. the overall dynamism of the economy of the region;

. the manner in which human resources are mobilized and used;

. the evolution of vocational training requirements;

. the evolution of the availability of school and vocational training.

II. BRIEF DESCRIPTION OF THE EDUCATION AND TRAINING SYSTEM

1. Institutional Background

School and vocational training in Portugal involves a wide range of participants, not limited to public facilities but also including recognized bodies operating under the auspices of trade union and other associations and the private sector. This diversity extends both to initial training, providing preparation for entry into active employment, and to continuing training, for the acquisition of knowledge and vocational

skills to meet constantly changing requirements. For the purposes of the present study, a definition of vocational training has been adopted, which comprises:

a) the provision of technical-vocational training under the auspices of the Ministry of Education (technical-vocational courses and vocational courses provided by secondary schools and technical-vocational courses provided by vocational schools[2]);

b) the provision of vocational training, organized by employment centres and vocational training centres, which are the direct or shared responsibility of the Institute for Employment and Vocational Training, the body responsible for vocational training in Portugal.

This structural organization conforms to a model that has existed since 1986, the date of publication of the Basic Education System Law, which provided for vocational training as a special type of school education. From the institutional point of view, this model is characterized by considerable centralization of the provision of school and vocational training, which is greatest in the area of initial training since, as far as continuing training is concerned, enterprises play an important role.

Centralization of the system is reflected inter alia in:

- the design and scheduling of training, involving choices regarding strategic areas of training, planning for and location of equipment networks, types of courses and programmed content of teaching materials;

- monitoring of the conduct of courses and training activities organized locally;

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[2] Although vocational schools operate under the auspices of the Ministry of Education, the initiative for them comes from local promoters (local authorities, employers' associations, trade unions, etc.) and the legal instruments setting up the schools and approving their courses are the subject of joint orders from the Ministries of Education and Employment.

- financing arrangements, which are essentially dependent upon the budget of the Ministry of Education (non-higher and higher school initial training) and that of the Ministry of Employment (system of apprenticeship and other initial training programmes, in addition to continuing training). These bodies are responsible for management of the budgetary allocations from Community funds (for example the ESF).

However, it is to be noted that there are two exceptions as regards financing:

. vocational schools are self-financing to a limited extent;

. higher-level training provided by private universities is not formally financed from public resources.

The system gives priority to initial training as a result of heavy investment in diversification of the range of alternatives, in particular in the technical-vocational area: technical-vocational teaching; vocational schools; apprenticeships.

However, this centralization is subject to two limited exceptions which are attributable to the convergence of two strategic orientations which also originated in the 1980s:

. the need progressively to take account of sectoral and regional concerns in the provision of vocational training;

. the need to promote the participation and mobilization of social partners and society as a whole.

This openness to the sectoral and regional dimensions, and also to the more influential aspect of social consultation with regard to training, is reflected in three basic developments:

i) consolidation of the network of vocational training centres (throughout the 1980s), with extended coverage of the various regions of continental Portugal, particularly on the basis of Jointly Managed Centres, involving the IEFP and employers'

associations in the relevant sectors of activity and, in some cases, regional employers' associations and trade unions;

ii) the launch of the Apprenticeship System (1986), based on cooperation between enterprises in various areas of activity, young people, employment services and training centres at local level - the level at which training activity is actually carried out (which means that, as far as principles are concerned, the apprenticeship system introduced an outward-looking approach in three areas: sectoral, regional and social partnership);

iii) the creation of Vocational Schools (1989), as a result of agreements concluded between local authorities, employers' associations, trade unions and the Ministry of Education, they being free to choose areas of training according to local demand.

2. The availability of vocational training in Alcobaca and Caldas da Rainha

The First-phase Report gave details of the availability of training in the municipalities of Alcobaca and Caldas da Rainha, identifying the teaching and training organizations and reviewing training courses and activities.

In the present report, it is important to take into account, for the purposes of closer study, certain components of the system which reflect the greater penetration of the centralist approach, referred to in the previous section, at sectoral and regional level, which exists and operates in a manner shaped by the emergence of different forms of cooperation between social, economic and institutional sectors, whether dependent on the central administration or enjoying local and regional independence.

2.1. Centro de Formacão Profissional para Indústria Cerâmica (CENCAL) (Vocational Training Centre for the Ceramics Industry)

CENCAL is a jointly managed vocational training centre created by an agreement concluded between the Instituto de Emprego e Formacão

Profissional (I.E.F.P.) (Institute for Employment and Vocational Training), the Associacão Portuguesa de Cerâmica (Employers' Association for the Ceramics Industry), and the Associacão Industrial da Regiao Oeste (Western Region Industrial Association), which represents the various types of enterprises in the region. From the institutional point of view, the structure of CENCAL does not include any trade union organizations in the sector but, on the other hand, it does involve an association representing regional interests.

CENCAL, which commenced its training activity in 1983, at Caldas da Rainha, operates on a national scale as far as ceramics are concerned but, at regional level, offers training courses in other areas (data processing, industrial handling, engineering, carpentry, etc.), these being areas in which local undertakings are short of labour.

CENCAL's areas of operation are as follows:

- training of workers, technical managers and administrators for the ceramics industry and for other industrial sectors at regional level, extending to:

  . initial training for young people (within the apprenticeship scheme on a sandwich course basis and within other support schemes for after-school training);

  . continuing training of people in employment (acquisition of skills, further training, retraining and enhancement of awareness);

- provision of services to the ceramics industry in general and to the regional business sector, with a view to development and innovation in the technical and technological, technical teaching, design and management areas.

After Portugal joined the EEC, the availability of specific support for vocational training and technical assistance for undertakings made it possible to increase the training activities of CENCAL considerably, particularly in innovative areas involving the introduction of new technologies in enterprises, and involvement in Community programmes such

as EUROTECNET and the programme for Exchanges of Young Workers.

2.2. Centro de Formação Profissional da Indústria Metalúrgica e Metalomecânica (CENFIM)

CENFIM (Vocational Training Centre for the Metalworking and Engineering Industry) is also a jointly managed centre, linking the Metallurgy and Engineering Industrial Associations with the IEFP. It operates in two geographical areas: Regional Offices for the North and South, which are decentralized into departments and sections where there is a heavy concentration of the industrial activities for which training is offered. The Alcobaca and Caldas da Rainha region is served by the Peniche department of CENFIM, and there is also a section at Caldas da Rainha.

Training is available in the following areas:

- training for young people in the form of sandwich courses (courses in machining and metalworking, engineers and designers);

- advanced training for workers (pneumatics, metalworking, welding, industrial handling and intermediate skills).

Training is available both for typical occupations in metalworking and engineering and in support occupations for fishing, ceramics, footwear and small units providing maintenance and repair services. Employers are very receptive and have absorbed all the trainees. However, the potential for training is limited by the difficulty of recruiting young people.

2.3. Vocational Schools

Vocational schools are a very recent development in the Portuguese educational system (post 1989/90) and are referred to here only in so far as they are the result of initiatives by local authorities.

The vocational schools in the region are as follows:

- Escola Tecnica Empresarial do Oeste (Caldas da Rainha): Under the auspices of the Municipal Council, the Commercial Association of the Municipalities of Caldas da Rainha and

Obidos, the Western Tourism Region and AIRO, it offers courses for specialists in management and business organization and in tourism (level III).

- Escola Profissional Agricola de Alcobaca (Alcobaca):
  Under the auspices of the Municipal Council, the Secondary School and agriculture cooperatives, it offers courses for specialists in agricultural management (level III) and for agricultural workers (II).

III. FUNCTIONING OF THE VOCATIONAL TRAINING SYSTEM

1. The demand for training: identification of enterprises' training needs

In the present study, the decision to study the conduct of enterprises in relation to vocational training, and in particular to study the way in which demand for training manifests itself, is based on the premise that enterprises play an essential role in the employment/training relationship as a result of the way in which they manage labour and the various kinds of relations which they establish with training bodies. This approach to the employer side of industry considers enterprises both as users of training and as providers of training, as in the case of larger enterprises which have their own training arrangements and train for the employment market, feeding regional networks of small undertakings which form an integral part of much wider business strategies (for example, subcontracting, recruiting, etc.).

An analysis of the demand for training, and in particular of the ways in which enterprises identify their training needs, cannot be dissociated from the predominant strategies of mobilization and utilization of human resources. In the past, the existence of abundant labour in the region and the relatively undemanding nature of the markets allowed certain levels of competitiveness to be achieved by recourse to cheap unskilled labour, contributing to and consolidating business management practices which, at the expense of training of human resources, favoured rudimentary models of on-the-job apprenticeship.

Against that background, the need to improve skill levels has become

apparent to the various local decision-makers - enterprises, training bodies, the public employment service, etc. - with very different levels of awareness, justifying preliminary attention to:

- the ways in which demand for training becomes apparent (through analysis of enterprises' perception of training needs) and, subsequently,

- the procedures for shaping the training offered having regard to two aspects: that of adjustment to the needs of the existing productive and business structure and that of anticipation of qualifications which will be a factor in attracting new business initiatives.

With respect to the identification of training needs, research was oriented in two directions:

i) identification by enterprises (compilation of information in a survey of 15 enterprises in the region);

ii) identification by vocational training centres, with information being collected through interviews with executives and specialists at the CENCAL and CENFIM Centres.

As a result of the interviews, the following fundamental points may be emphasized:

. situations frequently occur where the process of identifying needs is the responsibility of the production function - production management, production supervisor, departmental head, etc.; in larger enterprises, there are close links with the personnel management and various labour management methods are used as part of an employment forecasting policy (staff numbers and occupational profiles);

. in general, a considerable shortage of information to support decision-making is observed, particularly with regard to new qualifications and new occupational profiles associated with the installation of new equipment, the result of which is great

difficulty in specifying training needs. Consequently, insufficient advantage is taken of such equipment or else third parties are relied on to cater for the requisite skills (in enterprises which are more open to the use of consultancy services, for example);

- considerable centralization of decision-making within the enterprise, on the basis of information from production executives or equipment suppliers (small and medium-sized undertakings); in larger enterprises with their own personnel management departments or personnel advisers there is a delegation (or sharing) of decision-making responsibilities, which, moreover, extends to questions of recruitment, both internal and external, with a view to fulfilling the needs identified;

- (corollary 1) an inability is observed to interpret genuine demand for vocational training, with the exception of large enterprises which have training plans or include training components in their activity plans;

- (corollary 2) there is heavy dependency on the training offered by local authorities which, not being entirely matched to needs, gives rise to an appreciable degree of inappropriateness as regards qualifications; this is exacerbated by the fact that the human resources organization of enterprises cannot spare workers and managers to undertake external training (in Lisbon, for example).

The following typical features are identifiable regarding the facilities regularly used by the Training Centres to identify enterprises' training needs:

- survey on the basis of a detailed questionnaire addressed to enterprises; because of a low level of replies, this is reinforced by direct interviewing of a sample of enterprises (CENCAL);

- survey of needs carried out direct at undertakings by training

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promoters (trainees allocated by the IEFP to the Centre), on the basis of a predetermined table which takes account of the Centre's training capabilities (CENFIM); the recommendations resulting from this survey constitute the fundamental input for the training plan for the following year;

- follow-up of trainees in undertakings by a monitor from the Centres, who familiarizes himself with the circumstances in the undertaking and suggests adjustments to the learning processes or recruitment needs;

- questionnaire addressed to enterprises, based on the availability of courses/activities comprised in the training programme of the Centres, so that the undertaking can indicate its training priorities;

- post-training monitoring procedure (being set up at CENCAL), with interviews with businessmen and ex-trainees to assess the success or otherwise of the trainees' integration.

Irrespective of the relationships between training supply and demand dealt with in the section below, it is important to mention a set of factors that essentially operate in the regional context and affect the functioning of the local employment market, with repercussions for access to vocational training:

- There are objective factors restricting attendance at training activities:

  - during working hours, because of the difficulty which most enterprises have in releasing employees, either for reasons connected with the rhythm of the production process or because of pressure to use production capacity to fulfil orders received, or yet again because training, in particular further training and re-training, is needed above all by workers and managers who are required for normal operations;

  - outside working hours, because of the links which

production workers, and in some cases technical and administrative managers, have with other activities, ranging from work on their own account (agriculture, craftwork, etc.) to technical consultancy for more exacting operations in small and medium-sized undertakings in the sector in which they specialize;

- In specific production sub-sectors, the nature of the tasks carried out calls for skills which can be acquired by training on the job, which makes the idea of investment in vocational training less attractive; conduct of this type on the part of workers potentially leads to psycho-social obstructions to the re-organization of production, so that strong motivation becomes necessary for participation in vocational re-training activities;

- The lack of a substantial body of trainers at the various Centres, as a result of strong demand from enterprises for the best qualified people.

2. <u>Co-ordination between economic agents and the bodies offering training</u>

The results of the study show a relative imbalance between undertakings' vocational training needs and the profile of the vocational training available in the region. Basically, three types of imbalance are apparent:

. in relation to certain components of the existing availability (this applies to the range of standard types of training with more advanced content provided by CENCAL which, having the advantage of anticipating skill needs in production techniques, proves, in the short term and in the light of the average company background, to be inadequate and not capable of being used satisfactorily by those from which the main demand comes);

. in relation to the need for training for which there is no response from the training bodies established in the region (this applies in particular to management training for managers and executives and

training in more specialized technical areas in some industrial sectors);

- in relation to areas of training which anticipate skills with a view to catering for business initiatives in sectors other than those in which the existing typical specialization prevails.

At the present stage, and having regard to the facilities set up by the Training Centres in order to cater for training needs of undertakings, we are witnessing endeavours to promote proper coordination of the continuing training offered, together with a wider range of short-term actions designed to enhance the skills of and provide further training for people in employment, for which there has been strong demand on the part of undertakings.

However, there is still a deficiency to be remedied, namely the relative remoteness of large parts of the business world from the public employment and training service, which is reflected in the scant use, and in some cases great ignorance, of the measures and instruments involved in the employment and vocational training policy. Although certain unfortunate experiences in the past - in particular requests for training grants in the first phase of the application to Portugal of the machinery of the European Social Fund - have given rise,to a negative image of the organization and frequency of training actions, the establishment of regular relations between economic agents and the public service marks a first step towards strengthening the role of training in the promotion of regional development.

An analysis of the information obtained from our sample of undertakings interviewed shows that employers' associations will be able to play an important role in that process of establishing links. In fact, the few undertakings participating in training activities include in particular the ones that submitted applications in joint procedures set up by employers' associations, cooperatives, etc., which dealt with the bureaucratic and administrative side of the submission of applications and with the organizational phase (provision of halls, monitors, and so on).

The bodies involved in the vocational training system are in the

process of taking a number of steps to enhance training capabilities with a view to improving "performance" in terms both of ensuring balance and anticipating the qualifications needed.

Among the actions taken, the following steps are noteworthy:

i) consideration being given to the training strategy of CENCAL in order to add to the technical content the behavioural components of organization and use of business networks, with a view to increasing the attention paid to the human and organizational dimension of the users of training;

ii) reshaping of the methods of scheduling and planning the educational content of the courses offered by CENCAL, with the active participation of trainers and monitors in the introduction of systematized procedures (training needs, educational innovation, teaching materials, and so on);

iii) increased investment in the training of trainers in CENCAL, in cooperation with the Centro Nacional de Formacão de Formadores (a dependency of the IEFP), supported by a programme of teacher training with various modules in the course of the year, extending from basic training to the systematic updating of knowledge and methods;

iv) the setting up of a vocational guidance office in CENCAL, intended to publicise the availability of initial training among young people, in an attempt to overcome the psycho-social rejection of young people by those in the secondary sector; CENFIM has taken initiatives with the same aim in view, on the premise that the "marketing" of published materials is of decisive importance in the area of initial training;

v) the launch of Vocational Schools in the academic year 1990-91, consolidating the options existing in the region in terms of the compulsory post-school technical-vocational training available, on the basis of courses which potentially correspond to the needs identified locally.

Their in-depth, and already fairly well-organized, knowledge of the realities of the business world should enable the authorities within the

vocational training system to consider strategic options concerning the range of training to be made available:

- improvement of the training addressed to the specialized manufacturing sector or extension of the range of training offered to sectors involved in diversifying the economy of the region;

- emphasis on the training of middle managers or reshaping of training capabilities towards the acquisition of medium and advanced-level skills by senior executives and managers;

- maintenance of the present organic structure or openness to the involvement of social partners in new areas of activity of the Centres.

In most cases, the solutions to be found, as a means of reducing the imbalances between the supply of and demand for qualifications, will enable a "mix" to be achieved of continuity and change, not representing mutually exclusive areas of activity but rather reflecting the enhanced availability of vocational training as a whole.

3. Methods of co-operation in the area of training

The main vocational training organizations in Portugal are concentrated in the metropolitan areas of Oporto and, more so, of Lisbon, where the demand for training is higher and the potential support from related associations (undertakings, trade unions, socio-professional groups, etc.) is greater and more dynamic.

The local and regional manifestations of vocational training facilities are thus seen to be linked with two types of situation, which tend to converge:

a) situations of productive specialization, which adopt the course of institutional cooperation in order to set up training bodies intended for the specialized sector in question (involving the bodies which coordinate vocational training at central level);

b) situations of business dynamism, which cause local/regional

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training gradually to become available, with or without the involvement of public bodies.

CENCAL is a typical example of the convergence of these two trends, bringing together:

i) the central body co-ordinating vocational training: the Instituto de Emprego e Formação Profissional (IEFP);

ii) the employers' association in the relevant area of activity: Associação Portuguese de Cerâmica (APC);

iii) the regional employers' association: Associação Industrial da Região Oeste (AIRO).

The following table summarises the various components of school and vocational training in the region of Alcobaca and Caldas da Rainha, indicating the various providers involved and the levels of cooperation existing between them.

ELEMENTS OF THE EDUCATION/TRAINING SYSTEM AT REGIONAL LEVEL (ALCOBAÇA AND CALDAS DA RAINHA)

Sub-system	Institution	Providers	Levels of Co-operation
Teaching	Secondary schools in Alcoba\a and Caldas da Rainha: Benedita Day School	Ministry of Education	With companies in the context of technical and vocational course training periods
	Vocational schools in Alcoba\a and Caldas da Rainha	Ministry of Education A.I.R.D. Commercial Association Agricultural Co-operatives Municipal Councils Secondary School Western Tourism Region	Signatory promoters Agreement to set up facilities Making available facilities and equipment Pedagogical support
	Regional campuses of senior schools (Education and Art and Design) Private University	Ministry of Education Private University	Consultative Board Making available facilities and land for new facilities by the Municipal Council
Vocational Training	CENCAL	I.E.F.P./N.E.B.S. Portuguese Ceramics Association A.I.R.D.	Agreement to set up facilities Shared management
	CENFIN (Headquarters in Lisbon, Section in Caldas da Rainha)	I.E.F.P./N.E.B.S. Association of Southern Metallurgical and Engineering Industrialists	Organization of training activity
	Regional campuses of vocational training centres with headquarters in other regions (eg Footwear Industry Vocational Training Centre, Benedita regional branch	I.E.F.P./N.E.B.S. Employers' Associations in relevant Sector A.I.R.D. Companies	Organization of training activity
	Private training undertakings	Training undertakings Companies	Organization of training activity Co-operation with companies and training centres
	Employers' Associations	Trade associations Spa-hospital A.I.R.D.	Organization of training activity

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CENCAL and CENFIM which are both jointly managed vocational training centres are administratively and financially independent and are run by a Board of Governors whose Chairman is a representative of the IEFP. In theory, the participation of the various partners involves the scheduling of activities, the definition of the components of the training offered, the monitoring and supervision of the activities of the Centre and questions of financing. In practice, the picture is slightly different, in so far as:

- the tripartite management (IEFP, employers and unions) is compromised both by the fact that the trade union organizations are not represented, since they are not a party to the agreement [3] by which the Centres were founded, and because the IEFP reserves the right to appoint half the members of the Board of Governors, including the Chairman - who has a casting vote;

- the participation of employers' associations in substantive matters concerning training procedures and options is limited;

- as far as financing is concerned, the degree of involvement of the social partners is virtually nil; it is Community funds which cover almost the entire budget for the Centres' activities.

It should be added that in Portugal - and the Region and the dominant specialization sector are not exceptions - there is insufficient involvement of associations - both employers' associations and trade unions - with the result that the demands made are not very vigorously expressed and participation is weak from the technical point of view, both in terms of debate and in terms of sectoral and horizontal representation.

Vocational Schools, set up to ensure cooperation between local

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[3] It should be noted, however, that the legislation which set up the jointly managed centres does not require tripartite management, merely openness to the participation of employers' associations and trade-unions.

authorities and the Ministry of Education, are a relatively recent phenomenon but they nevertheless display the advantage of being the result of local initiative and of developing, from the organizational point of view, towards legal forms in which the presence of official patronage is less in evidence.

4. Arrangements for co-ordination and monitoring

4.1 Monitoring facilities

Apart from the procedures for management of the physical and financial execution of training action and programmes, no systematic monitoring exists and this is regarded by those in charge of the Centres a weak point in the way they operate.

There exists a Central Agency which monitors recruitment into employment, and which is intended to record the ways of entry into the world of active employment by young people who have completed school and vocational initial training (apprenticeship); however, it does not yet appear to do what is required of it, namely to provide, in due time, information to support the strategic thinking of the Centres.

In CENCAL's case, an informal scheme has been in operation since 1991 which is designed to monitor the post-training progress of young people (levels of employability, suitability of the skills acquired to the jobs held, socio-occupational situation, etc.) To monitor the practical effects for undertakings of the vocational training provided, use is made of the procedures already referred to which are oriented towards identifying training needs, and it is thus possible to record the reactions of undertakings to CENCAL's training profiles.

These procedures have made it possible to observe certain typical characteristic of the relationships between trainees and undertakings and between undertakings and CENCAL, to which it is appropriate to draw attention:

- a large number of undertakings do not have any organized arrangements to welcome and integrate new workers, who in the case of trainees from CENCAL possess a training background

which approximates to modern patterns, as regards the technical and business approach instilled in them, and this frequently means that such trainees feel some conflict regarding the typical working conditions in the undertakings and the mentality of those who run them;

- undertakings have the expectation that CENCAL trainees will be a "finished product", technically competent, well behaved, diligent, productive and with a sense of responsibility; this over-expectation derives from the fact that they apply to young people the same logic as they apply to adult training, where the people concerned are workers who already have experience of enterprises and are not trainees;

- undertakings thus build up a social picture of CENCAL linked with innovation and creativity, with associated ideas of flexible timetables and conduct, contrasted with a "Taylorist" approach, where the emphasis is on repetitive and routine activities and tasks.

The results obtained on the basis of the trends observed through the use of these monitoring procedures are being incorporated in the strategic thinking of CENCAL and will have repercussions on future programmes of activities.

4.2 Machinery for coordination

The activities undertaken by the various institutions that make up the school and vocational training system and provide technical-vocational courses are not the subject of any coordinated action and no machinery has been set up to coordinate them. Within the available training, alternative options exist for the same target population, it being considered that demand will bring about the necessary changes by indicating which courses best meet the needs and expectations of both the socio-productive side of society and of young people and families.

As far as jointly managed training centres are concerned, it is not apparent from the study carried out that the representatives of the employers' associations have any decisive influence on the structure and

content of the vocational training offered; it seems that the independence, in technical and teaching terms, of the authorities running the Centres prevails.

The question included in the interview which was designed to determine the extent to which undertakings participate in defining the scope to the training to be offered for the various participants in the system produced answers which indicated an almost total lack of participation, in terms both of consultation and of the submission of suggestions - the reverse was true only in undertakings in sectors where interested associations are more dynamic or where established procedures exist for the management of human resources.

From the point of view of the integration of vocational training in the measures and policies for development of the region, the Programa Operacional do Oeste, which includes the municipalities of Alcobaca and Caldas da Rainha, covers a set of vocational training activities described generically as follows:

- "vocational training deriving from the functioning and use of the infra-structures and facilities to be set up by the Programa Operacional;

- training to meet the needs of those offering employment as a result of the direct and indirect effects of the Programa Operacional'.

Emphasis is placed above all on small-scale training activities, it being considered that most training is covered by other measures supported by the ESF, in particular through the Operational Programmes.

Within the Portuguese political and administrative structure, the lack of regional authorities with their own terms of reference and powers, of the kind found in various European countries, largely accounts for the failure to integrate sectoral and horizontal instruments and policies - as is the case as far as vocational training and education are concerned - into policies for the promotion of regional development, so that the synergetic benefits that would result from an approach which integrated various technical, financial and institutional aspects are lost.

In this case, the arrangements for coordinating training are basically internal to the institutions and are designed to maximize the availability of the training in question. Examples of this are:

- the consolidation of trainer training practices, strengthening links with undertakings;
- selective recruitment of human resources at the centres;
- the creation of facilities for vocational information and guidance.

Within the scope of the study, no evidence was discovered of any systematic cooperation between bodies in the school and vocational training system, except for cooperation between the Rafael Bordalo Pinheiro Secondary School at Caldas da Rainha and CENCAL regarding specific elements of CENCAL's training programmes.

IV. CONTRIBUTIONS TO THE EVALUATION OF TRAINING ON A TERRITORIAL BASIS

1. Placing training evaluation in its context in territorial terms

The literature on this specialized area records a vast range of theoretical and methodological references concerning the problems involved in the evaluation of vocational training. However, whilst it is true that there is an abundance of contributions in the sphere of evaluation of the pedagogical aspects and the effects on trainees and undertakings (that is to say, micro-evaluation), there are few contributions concerning macro- and meso-evaluation: the evaluation of training policies as a whole - as instruments used by the public authorities - and evaluation of the sectoral and regional dimensions of vocational training.

In this study, the question at issue is precisely the evaluation of the conditions and of the effects (impact) of vocational training operations in a territorial context. This means that, in the absence of solid references to the theoretical approach to be taken, it is important to describe the context in which the various aspects of the question are to be studied.

An analysis of the relationships between vocational training and regional development from the evaluation point of view comes up against a number of obstacles of a methodological nature, largely deriving from the complexity of the factors involved in that relationship:

- in Portugal, the specific vocational training facilities in a given region - schools, training centres, etc. - are not only formally dependent on decision-making authorities at a level above regional level but are also instruments within sectoral vocational training policies;

- the solutions of regional partnership developed within the ambit of the management and implementation of training programmes and activities are recent and involve action by a range of participants with differing expectations and degrees of involvement, and also with distinct approaches to regional integration;

- although there appears to be considerable agreement - according to the results of the interviews - that vocational training is a strategic means of achieving development, a very disparate range of training solutions exists which, in significant parts of the business world, comprises informal schemes extending from in-firm apprenticeships to the independent organization of training activities, dispersing the sources of information needed to be used and fragmenting the subject-matter of the present study;

- since the training activities and programmes of the various institutions are not part of an approach focusing exclusively on regional development and are not even integrated into policies for the promotion of regional development, it becomes particularly difficult to identify the specific effects of training on the regions;

- the effects of the training offered (vocational training and re-training activities and programmes) by the socio-productive spheres of each region are intermingled with the effects of parallel initiatives in the area of productivity projects,

demonstrations to improve quality, the introduction of innovative technology, etc., to mention only a few of the industrial policy initiatives which are also resorted to by enterprises in the region.

2. The basis of the system-orientated analysis

The creation of qualifications and the social and economic use to which they are put represent a relationship between two sub-systems (the provider sub-system and the client sub-system), whose internal decision-making processes give rise to manifestations of supply and demand for qualifications which involve relationships of conflict and cooperation - both on the inside and in links with the outside - which must be studied and evaluated precisely on an interactive basis.

The two sub-systems tend to reflect particular strategies and expectations and are to a varying extent independent from the acquisition of knowledge and technical-vocational skills.

To summarise:

i) the provider sub-system is made up of the bodies in the vocational training system responsible for the design programming and implementation of vocational training activities (initial and continuing) addressed to the client sub-system. In Portugal, the provider sub-system is made up of:

- the Institute for Employment and Vocational Training, which coordinates training policies at national level and is responsible for their implementation at local level through:

  . the Employment Centres, which locally coordinate and manage access for young people, people in employment and undertakings to vocational training facilities;

  . Directly Managed and Jointly Managed Vocational Training Centres, which organize and implement training activities at local and regional level;

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- the relevant Ministries, which design, programme and implement training activities within their respective spheres, in particular the Ministry of Agriculture and Fisheries, the Ministry for Industry and Energy, the Ministry of Commerce and Tourism and the Ministry of Health;

- sectoral and regional Employers' Associations, which, by different methods (consultancy, management, etc.) take part in decision-making processes regarding the provision of vocational training;

- training-promotion undertakings, which design and organize training activities by way of sale/provision of services.

ii) the client sub-system is made up of the target population to whom the training activities are addressed (young people, unemployed people, workers, and so on) and of undertakings as recruiters and users of human resources with specific vocational qualifications.

As regards undertakings, a special observation must be made: strictly speaking, undertakings are involved in both sub-systems. In fact, the following situation is to be observed in the Alcobaca and Caldas da Rainha region:

- there are undertakings which, having their own training capabilities, offer surplus training for the employment market and, as such, must be included in the provider sub-system;
- at the same time, there are numerous small and medium-sized undertakings which are heavily dependent on the provision of training (and in most cases, their contacts are through employers' associations in the relevant sector of activity or, more particularly, through the AIRO); this group forms part of the client sub-system only.

The two sub-systems operate in a specific regional context, marked by the existing socio-productive structure which is described in Chapter I,

particular emphasis being placed on the aspects relating to:

- productive specialization in the traditional sectors;
- the functioning of the local employment market, in particular the bases of recruitment and labour management;
- the typical features of the persons and organizations operating locally, whether they are associated with business initiatives, training bodies or sectoral authorities of the public administration (IEFP; Territorial Administration; Agriculture and Industry).

The conduct of research designed to take account of regional circumstances and at the same time of the patterns of emerging relationships (conflict/cooperation) both inside each of those sub-systems and in their relationships with each other - so as to understand the decision centres and the strategies and expectations of the various parties involved on each side of the training/development relationship - thus appeared to be the option most consonant with the objectives of the Study.

The choice of that option meant that the evaluation procedures had to be directed as a matter of priority towards the process adopted, which involves two closely inter-linked aspects:

i) analysis

- machinery for decision-making, design, organization and implementation of vocational training activities;
- cooperation arrangements set up between the main parties involved;
- the integration of training in regional development instruments and policies;

ii) intervention, in the sense of working out recommendations for both the sub-systems so as to make (re)adjustments in various areas:

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- information systems;

- design and programming of activities;

- content of training activity;

- redefinition of roles and methods of cooperation between the main parties involved, with a view to enhancing qualifications and promoting regional development.

3. Construction of a reference table for the evaluation of training in a territorial context

In the case studied (Chapter II), the evaluation of training has the advantage of being treated as the evaluation of a public policy, since not only do most of the components on the supply side of training stem from intervention, management and implementation on the part of a public authority but also the rules governing conditions of access and provisions concerning the certification and administration of financial resources refer back to that same public authority.

This manner of proceeding means that certain aspects of the conceptual and methodological framework of the evaluation of public policies are adopted, namely the involvement of the varies parties concerned and the authorities responsible in the evaluation process and the treatment of evaluation as a process for the support of decision-making. And since the purpose of this evaluation is directed towards understanding the effects of vocational training on regional development, certain limitations naturally arise:

- the programmes of training activities embodied in the activity plans of the Vocational Training Centres are sectoral in character and adopt public policy training objectives; accordingly, despite the fact that they may generally respond to a sectorally differentiated regional demand *, they are always conceived on the basis of the promotional concerns of the regions where the centres are located;

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* In particular as a result of the use of various facilities available to the Vocational Training Centres to determine the needs of the regional economy.

- the machinery for cooperation on a regional scale takes effect exclusively in the areas of consultancy and supervision, without any impact on design and programming.

In view of this, it became more necessary to focus the evaluation on the aspects of the process, relations between the parties involved and machinery for training/regional development interaction.

The construction of a reference table for an evaluation on that basis of course diminishes the problem of reconciling the analysis with the structures and operational approaches based on the separation, already referred to, between the provider and client sub-systems, which are related to each other and develop as a result of their own dynamism (function of their power of dominance) and their induced dynamism.

An analysis of the results of the interviews with the various elements of those two sub-systems (above all business executives responsible for the management of human resources in larger undertakings or in charge of training centres or the public employment service) concerning the intensity of the relationship between vocational training and regional development brings to light the diffuse nature of the relationship and the difficulty of apprehending/circumscribing its effects - this being without prejudice to generalized agreement concerning:

- the positive effects of the existence of vocational training facilities located in Alcobaca and Caldas da Rainha (Vocational schools, Vocational Training Centres);

- the advantages deriving from the fact that the vocational training offered is more in conformity with the territorially identified needs.

The multiplicity and variety of the parties involved (officials - technical experts and those responsible for central and local administration; business people; managers and trainers at centres, etc.) gave rise to a varied framework of approaches and interests, in the light of the differing ways in which the relationship manifests itself. Accordingly, in a process of evaluation in which no institution can be identified as the authority giving the instructions for the evaluation to

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be carried out [5] - and thereby defining precise objectives and terms of reference - it becomes necessary to set out a summary framework of references for the process of evaluation, which places in context the strategic elements to be taken into account for the purposes of the study.

The following table summarises those elements, identifying, by reference to a central nucleus of areas of evaluation, the levels of evaluation to be considered in a regional perspective, and also the questions which appear relevant to the carrying out of studies of this kind.

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[5] In the context of this study, the relationship between the researchers and the subject of their analysis is not supported by a degree of legitimacy authority accepted by those responsible for providing training or other regional authorities (instructions for an evaluation study, for example).

ANALYTICAL TABLE FOR THE EVALUATION OF TRAINING
IN A TERRITORIAL CONTEXT

AREAS OF EVALUATION	LEVELS OF EVALUATION FROM REGIONAL STANDPOINT	QUESTIONS OF EVALUATION OF TRAINING IN A TERRITORIAL CONTEXT
1. Formulation of policies and methods of vocational training	▸Spatial arrangement of policy objectives and methods of training ▸Incorporation of vocational training in regional development policies	▸Image which those involved have of vocational training. ▸Importance of effective availability of vocational training for the promotion of regional development
2. Design of vocational training programmes	▸Extent of use of facilities for the identification of companies' training needs ▸Extent of use of information on the employment market and the regional economic aspect	▸Procedures for the identification of demand for training ▸Ways of reconciling training supply and demand ▸Use of support facilities for decision-making
3. Facilities for the implementation of programmes and action	▸Independence of local organizations for the management and implementation of training programmes ▸Cohesive training models taking account of characteristics of client sub-system	▸Typical features of those who offer vocational training. ▸Monitoring facilities and means of co-ordinating training at regional level
4. Procedures for institutional co-operation	▸Machinery established to ensure regional integration of the various providers ▸Competences and autonomy of the regional authorities within the vocational training system	▸Levels of co-operation between providers within the vocational training/regional development relationship: fields of action, procedures and limitations ▸Intra- and inter-regional co-operation strategies
5. Instruments for monitoring and evaluation	▸Regional economic and social information system: ▸Integration of evaluative criteria in the context of training/regional development relationships	▸Appropriateness of training offered to the qualification requirements of the regional economic system ▸Back-up for decision-making by components of the provider and client sub-system

V. CONCLUSIONS AND PROSPECTS

1. Final considerations

The study undertaken has provided relatively detailed information on various aspects relevant to the problems involved in the evaluation of training in a specific territorial context, in particular:

- the regional aspect (the dynamics of socio-productive systems and the prospects of development over time in Alcobaca and Caldas da Rainha);

- the availability of vocational training facilities established within the region (components of the system, means of identifying demand, the design of training facilities, and so on);

- the arrangements for co-operation set up between the various people and organizations involved at local level: providers and users of vocational training in the region.

Overall, the researchers consider that there are still a number of gaps to be filled, until the various participants and the various decision-making authorities adopt, in their corporate strategies (the undertakings), in their vocational career paths (the active population and young people) and in their training choices (the institutions within the training system), a logical approach of actively making use of vocational training, which has ramifications for the promotion of regional development.

The most recent socio-economic changes brought about by increasing internationalization, with the integration of productive networks and more demanding markets, have not yet resulted in a corresponding increase in the overall demand for qualifications. On the other side of the picture (the education and training system), the foreseeable emergence of new productive sub-sectors within traditionally specialized sectors or of new branches of activity for which the region is endowed with comparative advantages, has not been accompanied by a strategic change of direction in the supply of

qualifications, envisaging training adapted to new occupational profiles.

This twofold finding makes it possible to identify the various levels of the deficit in terms of evaluation of vocational training, from the evaluation of performance to the evaluation of results and the evaluation of the process (the training facilities).

In that context, the regional co-operation schemes, although reflecting a positive step forward (if account is taken of the initial situation, in that the providers are to some extent outsiders as far as training is concerned and adopt individualistic practices), need to undergo a qualitative change which will ensure their greater involvement in the regional context. The production of support facilities and the provision of a technical basis for decisions and the introduction of procedures for the monitoring of training facilities and their effects represent essential steps towards encouraging the various regional partners (undertakings, training bodies, young people, local authorities) to play a more participative role.

In highly centralized systems, such as the Portuguese system, the process of local appropriation of employment and vocational training policy measures and procedures may make a substantial contribution to mobilization of the inherent potential, particularly against a background of socio-economic change.

From that standpoint, the institutionalization of regular vocational training evaluation procedures could also play a part in regulating supply:

- by adjusting training methods (options regarding strategic vocational areas and regarding choices of programmes, educational content, support materials, training of trainers and so on);

- by reconstructing the network of relations between new protagonists who are moving into the region (for example, foreign investors, other training agents, providers of services, etc.) and might make it possible to enhance and broaden the co-operation arrangements already in existence.

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This evolution calls, however, for networked action on the part of the various locally based agencies responsible for the provision of training. In fact, given that the education and training system is made up of components at both sectoral and national level, the local liaison offices of the public Employment and Training service (in this case the Employment Centres of Alcobaca and Caldas da Rainha) should, in conjunction with the local management, act as catalysts for the process of evaluating vocational training, ensuring that this process:

- adequately embodies the criteria inherent in a regional approach, which implies that there must be support for management and decision-making;

- involves the various participants whose action can contribute to the operational viability and success of the evaluation function;

- is open to the developing situation resulting from the social and economic changes that will take place in the region.

It is against this background that must be viewed the problems involved in taking a systematic and integrated approach to a multiplicity of elements supporting decision-making on the part of both members of the provider system and members of the client system of vocational training which, in terms of regional development, are protagonists/agents and, as such, represent factors, on the demand side, in the system of vocational training. The construction of a system of compilation, processing and management of information on crucial matters such as the functioning of the labour market, the expectations of enterprises and of human resources, the activities and projects of the agencies within the education and training system or the regional development programmes and initiatives, is a factor which would shape the evolution of the training/development interface in a regional context.

2. Prospects of comparative research regarding the evaluation of vocational training by reference to territorial areas

Having regard to the typical features of the problems facing our country, in particular the Alcobaca and Caldas da Rainha region, the

research in this area, in a context of extended co-operation with other European teams, should follow three lines which are complementary to each other, namely:

- that of the production of support facilities for the management of the regional training/development interface, particularly as regards the design and implementation of training programmes, the functioning of the employment market (striking a balance between supply and demand) and the machinery for evaluation by means of a permanent monitoring system, involving evaluation of results with a view to readjustment of the training system and its subsequent harmonization with needs in terms of qualifications;

- that of enhancement of the machinery for co-operation within and between regions, so as to bring the relationship between vocational training and regional development into broader frameworks, with an increasingly comprehensive and competitive approach;

- that of adapting the system of regional economic and social information to the management needs of the employment and vocational training market, bringing together statistical information concerning the various target populations, the totality of the training action and programmes undertaken in the region and the emerging realities of the local labour market (access to employment for rural populations, foreigners, young people and women without any qualifications, and so on).

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Evaluation of vocational training in a territorial context
Vocational training and development in the region of Alcobaça and Caldas da Rainha

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